HOW TO USE RELATIONSHIP TREES IN SETTING STRATEGIC GOALS

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When you need to manage multiple complex projects or relationships quickly and definitively, a relationship tree (diagram or matrix) is an easy and convenient way to strategize. This tool allows for smooth conceptualization, review, execution, and reporting on data by mapping out information in a selected graphical structure.

What is a Relationship Tree?

A relationship tree is a structural diagram or graphical illustration that simply maps out and organizes information in a visual format. These trees guide the thought process and are especially useful for visual learners. They enable the individuals creating the tree to think aloud by generating, outputting, and presenting their thoughts, plans, and ideas optically, and allow audiences to easily visualize and grasp messaging as well.

Specific points on the tree can be easily focused on and modified as necessary. When done correctly, this visual interpretation of information allows for quick construction, viewing, and assimilation, enabling viewers to absorb and process the material with ease. Studies reveal that memorization and comprehension of information is improved when relationship trees are used.

Any number of elements can be illustrated in a relationship tree, including, but not limited to:

- Relationship or flow from one point to another;
- Influence;
- Hierarchy or classification;
- Strength;
- Frequency;
- Function; and
- Timeline.

These trees appear in several forms, including charts, concept maps, and mind maps, and can be used to "tree out" virtually anything. Whether done by hand or via an online tool or software program, the tree is an incomparable vehicle for scheming and relaying all forms of information.

There are no real rules for constructing a mind map. Relationship trees can be displayed in either a symmetrical format, such as a chart or table, as shown in Figure 1, or, more

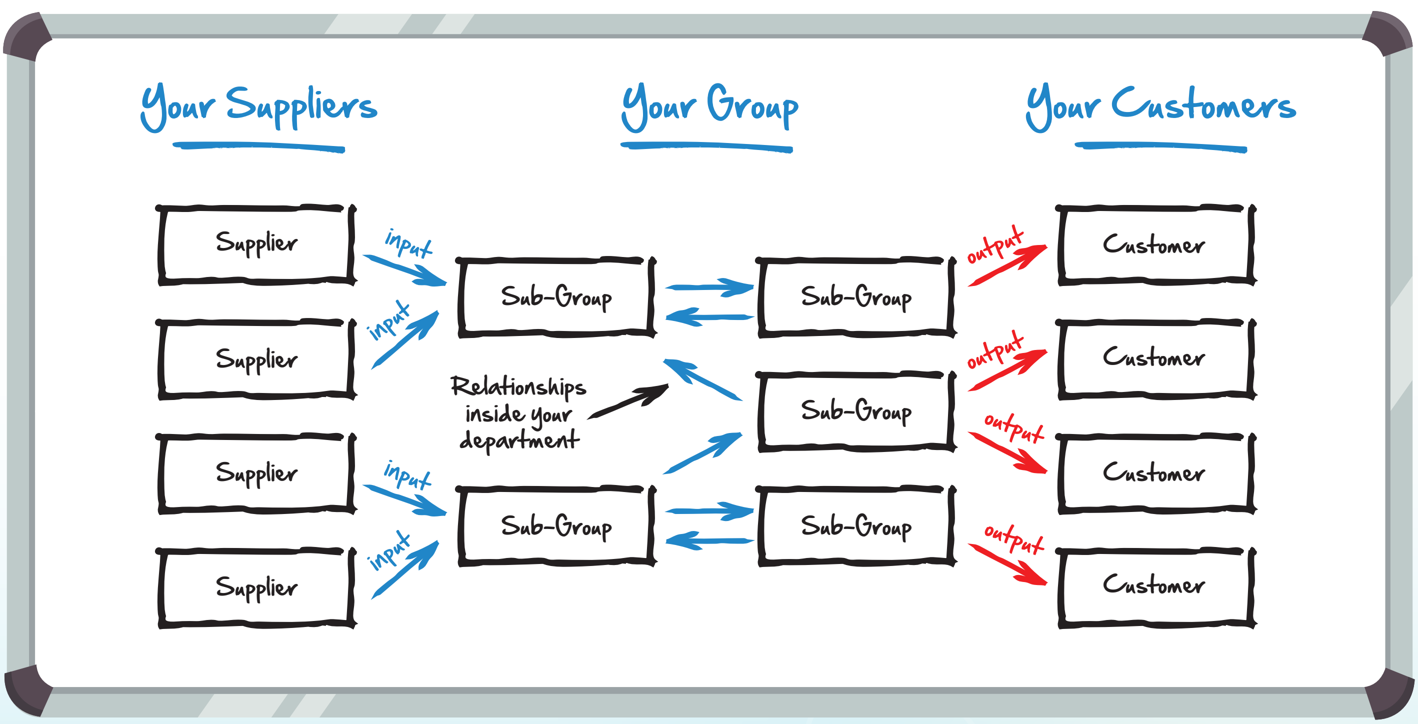

Figure 1. Sample symmetrical relationship tree.

commonly used for strategizing, an asymmetrical and more fluid composition like a mind map, as shown in Figure 2, depending on your preference and/or objective.

In a more linear tree (Figure 1), there is usually a source (left column) and a target (top row), with other elements coded to show their position/impact on the relationship. A more fluid diagram, Figure 2, has the same effect and may be practical in representing more robust and intertwined information. The latter is generally used initially and can be turned into the former for finalization if desired.

How To

Generate ideas and identify main topics, relationships, and/or key words to form the foundation and critical components of your tree. Various shapes, colors, symbols, and dimensions may be used—and are recommended—to map these out and distinguish items in a way that makes the best sense for your purpose.

Now that you have the core concepts identified, the natural first use would be to identify workflows, associations, events, and other secondary and supplementary elements, including business rules to put the chart or map into practice.

In the PEO environment, we have a normal high velocity of transactions—payroll, benefits, taxes, and claims, to name a few. Each of these is driven by workflow and events. We have a workflow for payroll that happens on a weekly basis with technology, exceptions, escalation, and business rules. We have events such as a master healthcare plan enrollment and renewal on an annual basis. Both of the examples could leverage a relationship tree to fully form a plan to communicate, execute, and audit those activities. The relationship tree could dictate who needs to act, who needs to know, internal and external timelines, and audience of critical communication.

Implementation/In Practice

At PEOPL*EASE*, we use these kinds of diagrams every day to map out projects, goals, and processes. The whiteboards in our conference rooms are perpetually and notoriously covered in various relationship trees and styles, as shown in Figure 3. This form of plotting and displaying information has proved easily digestible for our entire team when brainstorming, applying visual thinking, and problem solving—allowing for a clear tactical approach, absorption of material, and faster execution of goals.

Teams are able to not only generate ideas, but also explore them through jotting them on a whiteboard within a collective think tank session. When conveying information to a group where input is not required, this style of circulating information cuts down on note taking. Spectators still feel involved and invested in the process so the information is not only more firmly stored in their minds, but they can also simply snap pictures through various stages and when the map is complete rather than scrambling to keep up with a lecture. We particularly enjoy using these trees to engage all departments simultaneously. Mapping out how a project touches each department provides everyone with a better understanding of the entire engine, beyond just their cog. Participants walk away with a better understanding of

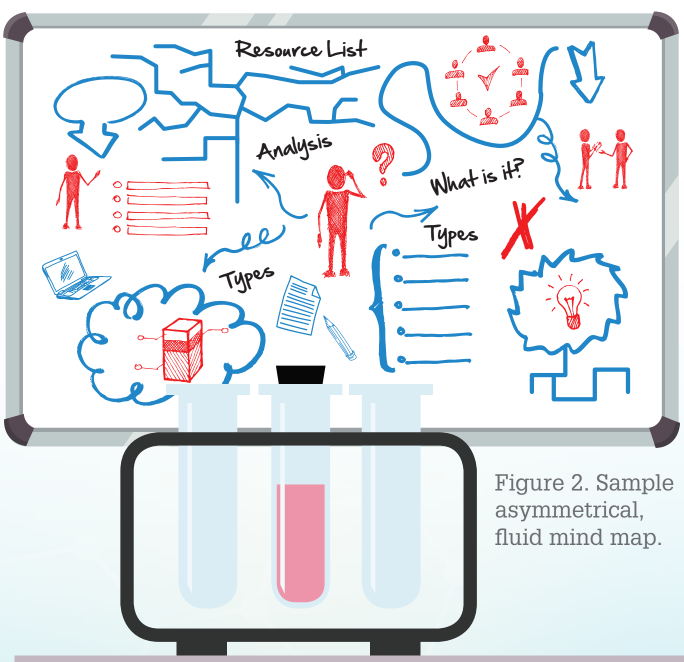

Figure 2. Sample asymmetrical, fluid mind map.

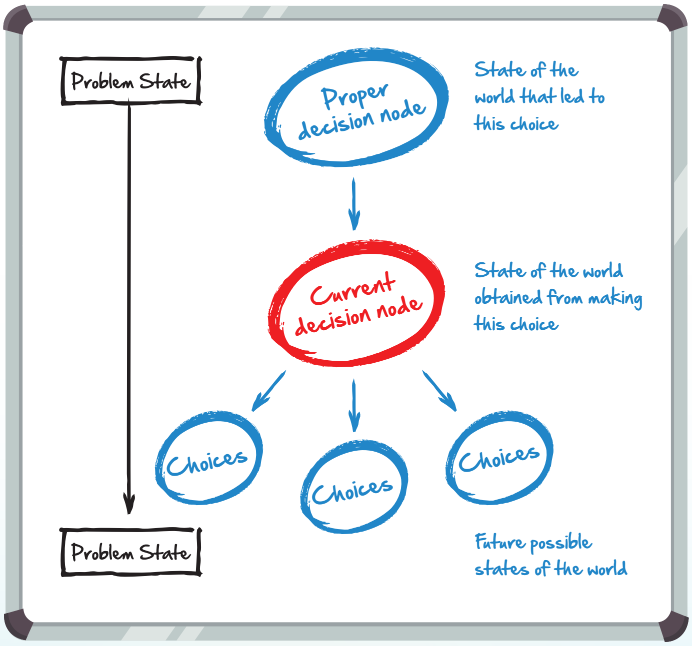

Figure 3. Sample diagram used at PEOPLEASE.

systems across the organization, and a newfound respect for their colleagues and what they do.

Why Strategic Plans Fail

Strategic plans often fail because they begin in error. Defining objectives from the beginning is key. It's important to understand the market/business environment, outline goals, and orient yourself and your team to achieve results.

Being nimble is also essential. Change is not only inevitable, but crucial. Flexibility and the ability to adapt as market conditions ebb and flow are essential. You cannot be an ostrich with your head in the ground and ignore reality. Whether or not your business is immediately impacted, prepare yourself as if it is or will be. Planning to sustain a blow will ready you in the event you really have to. You will be more agile and fast to act with a plan in place.

Collection and Aggregation/In Strategic Planning

Now that you have a relationship tree in practice, the next critical component is what most people miss—*measure and listen!* There are many tools available that support structured feedback. We've engaged these with great success:

- Observe, Orient, Decide, Act;
- Plan-Do-Check-Act;
- After Action Review; and
- Specific, Measurable, Assignable, Realistic, and Time-Related, our version of SMART goals.

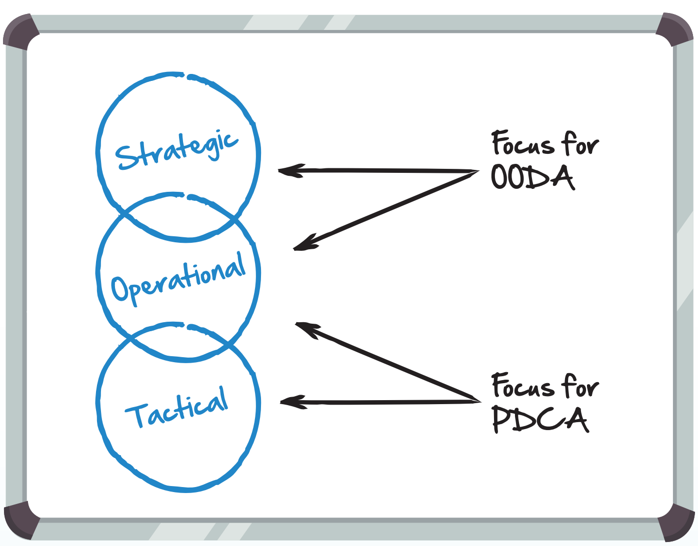

Figure 4. Overlapping focus of the OODA and PDCA tools.

Figure 4 shows the overlapping focus of two of the structure feedback tools.

These methods allow for removing anecdotal opinions and replacing them with quantitative and qualitative facts of last years' failures, successes, execution time, cost to serve, and value proposition evolution. This is the bedrock of preparation in advance of any strategic planning session. Collecting this input as pre-work by functional area makes your decisions clearer and planning 10 times more effective/efficient. In addition, as you uncover anomalies or outliers (for us, we began perceiving the coming recession from autonomous truck operators and independent contractor misclassification escalation), there should be a specific source within the relationship tree that you can reach out to for specific data to support the view. Equally of value is that it forces us to extend our strategy planning conversation outside of our four walls.

Dive into the year by using a different tool to move your team and your service delivery forward. Once you have employed a tool such as a relationship tree, it catapults progress, clarifies expectations, and enhances accountability and efficiency. Who doesn't want that for their businesses, teams, and clients?

Keep on trucking! ●

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